



Iowa Department of Revenue Protests Kaizen Event Report Out

**“Gospel According to Jim and His
Frozen Disciples”**

Oct. 31- Nov. 4, 2011

The Opportunity

Victoria Daniels

The “Gospel According to Jim and the Frozen Disciples” Team

Denny Schutt



**Denny Schutt-IDR, Jim McNulty-IDR, Brie Sime-IDR,
Julie Moon-IDR, Steve Campbell-IDR, Malia Kirkpatrick-IDR,
Carie O’Brien-IWD, Mike Rohlf-DED, Marcia Tope-DHS**



Scope

Brie Sime

- This event will address the Protest process from when a Protest is received to when the Protest is either closed or moves to contested case proceedings.

Goals

Malia Kirkpatrick

- 1.Reduce average lead-time by 50% (from 24-30 months to 12-15 months)
- 2.Reduce inventory by 30% within one year (currently 670)
- 3.Reduce non-contested case AG assignments by 25% (currently 350)



Objectives

Julie Moon

1. Reduce dependence on the AG office
2. Understand the whole process
3. Better communication
4. Increased efficiency
5. Overall process improvement
6. Involve others in the protest process
7. Free up Jim's time and others' time for other job duties
8. Have consistency in the process



Kaizen Methodology

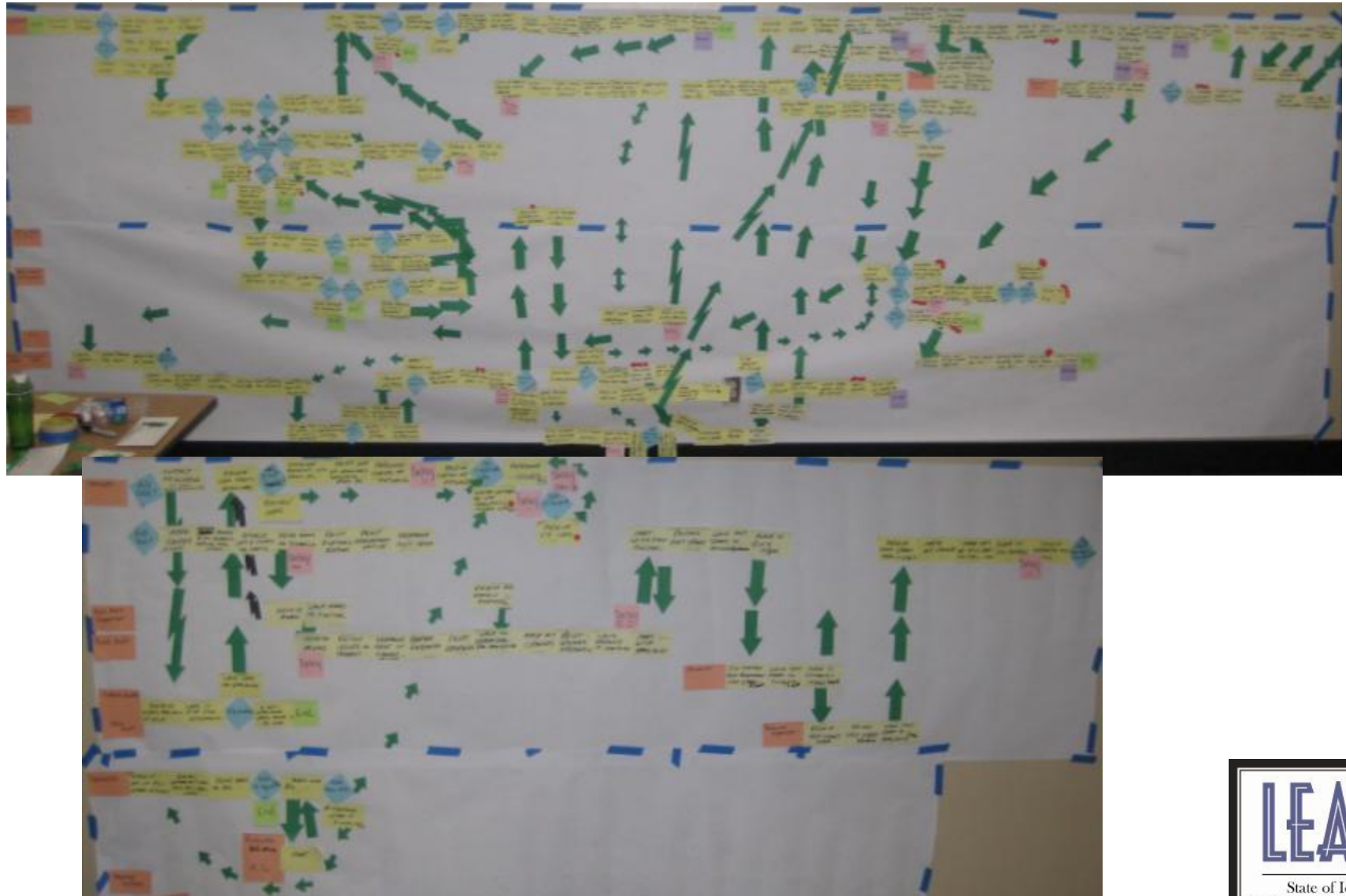
Steve Campbell

- Clear objectives
- Team process
- Tight focus on time
- Quick & simple
- Necessary resources immediately available
- Immediate results (new process designed by end of week)
- 5S “mindset”--use the steps to support the event activities
 - Sort, Set in order, Shine, Standardize, Sustain



Current Process

Jim McNulty



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Brainstorming

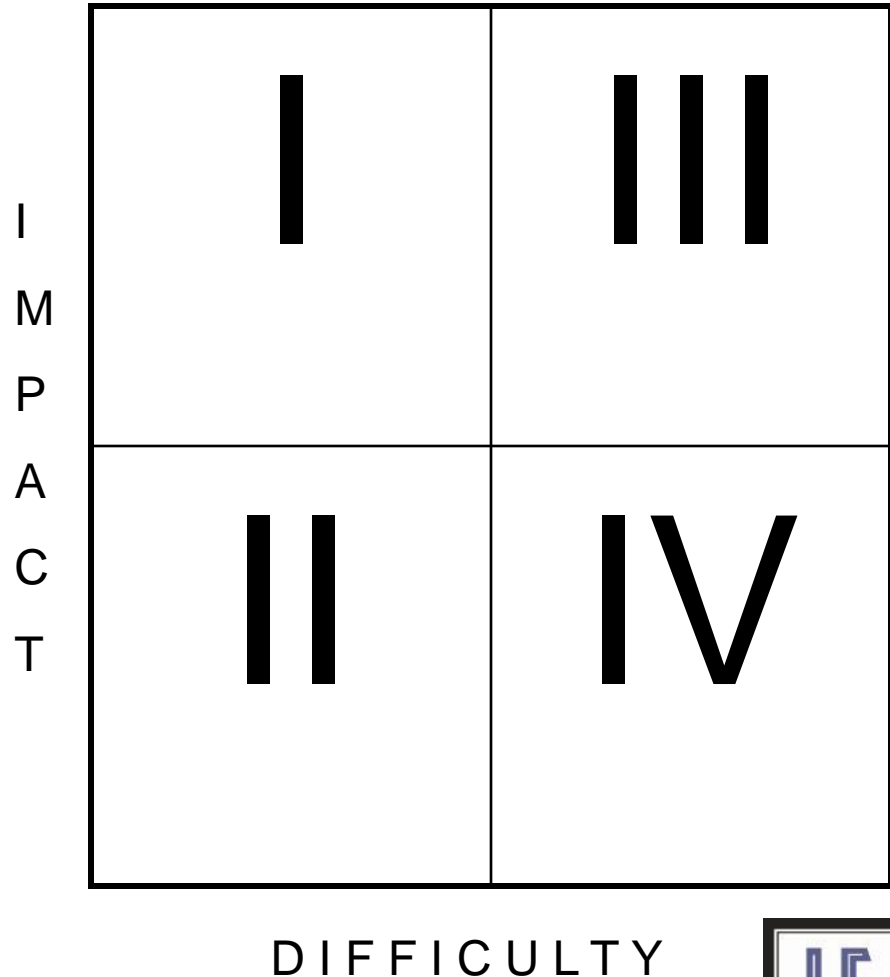
Julie Moon

- Utilize email for sending documents internally
- Create a checklist guide for decision making of protests
- Identify timeframes that IDR staff need to follow for processing protests
- Obtain access to necessary systems for appropriate staff
- Allow Specialists to sign letters

De-selection Process

Malia Kirkpatrick

- Identifies
 - Impact to customer
 - Difficulty implementing
- Helps to rate/rank solutions to resolve issues while identifying ease of implementation



Jim McNulty



Results

Carie O'Brien

	Current	New	% Change
Total Steps	697	455	-35%
Total Delays	70	43	-39%
Average Delay Time - Hours	6288	3059	-51%
Value Added Steps	21 (3%)	12 (3%)	-12%
Decisions	66	52	-21%
Loop Backs	7	1	-86%
Total Handoffs	106	50	-53%
Lead Time - Hours	2536	133	-95%



Homework

Steve Campbell

Item	Item Description	Person Responsible	Due Date
1	Obtain access to systems for Julie/Hearing Section	Jim	12/6/2011
2	Review protest documents on A.C. (including templates and envelopes)	Denny	1/6/2012
3	Julie process for timeliness	Julie/Jim	1/6/2012
4	Eliminate review/proof reading of letters going out under specialist name	Jim	1/6/2012
5	Develop checklist for AG, Quick Resolution, 3 Decisions	Jim	1/6/2012
6	Allow originator to complete fact sheet	Brie/Malia	1/6/2012
7	Email field auditor comments to specialist and field supervisor	Steve	12/6/2011
8	Eliminate 2nd chances not required by statutes	Jim	2/6/2012



Team Member Experience

Brie Sime

Carie O'Brien

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Comments

- Marcia Tope, DHS
- Mike Rohlf, IEDA

**We welcome your
questions and comments!**

